

Harris County Microsoft SharePoint Application Usage Policy

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SharePoint Application Usage Policy

Overview

Introduction This document provides the policies and procedures for Microsoft SharePoint usage within Harris County.

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Site Provisioning Policies

Site usage Sites should target a specific audience and should be used

- By departments to communicate organizational messages, or
- By teams as a method for organizing information specific to the team or project on which they are currently working. Teams can be divisions, project teams, committees, or other groups with shared business goals.

Definitions The following definitions are

Term	Definition
SharePoint Administrator	An ITC employee with administrative rights over all department (top-level) and team sites
Department (Top-level) site	A site created by the SharePoint Administrator and provided to a department upon approved request.
Department	Any recognized Harris County department created by Commissioner's Court
Site Administrator	An employee assigned by the Department Head for top-level administration of the Department site
Team Site (Sub-site)	A site created by a Site Administrator and provided to a Team Site Owner for team collaboration
Team Site Owner	An employee responsible for the daily business use of team sites

Site Administrators All Site Administrators must complete the training described in the "How to Become A SharePoint Site Administrator" section of this document and sign the SharePoint policy statement prior to becoming a Site Administrator. All department sites and Site Administrators must be approved by the Department Head.

Department Site provisioning Upon approval of a department site request, the ITC SharePoint Administrator will provide that department's Site Administrator with a top-level site and grant provisioning permissions (create, administer, delete) to the Site Administrator. Only one top-level site will be provided per department.

Templates A master template created by the ITC will be used for all top-level department sites. A set of approved team site templates will be provided by the ITC. Team sites will be created with templates appropriate for their business purpose.

Access to new sites Site Administrators will control the provision of team sites and grant permissions (create, administer, delete) to those sites as warranted.

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Site Provisioning Policies, Continued

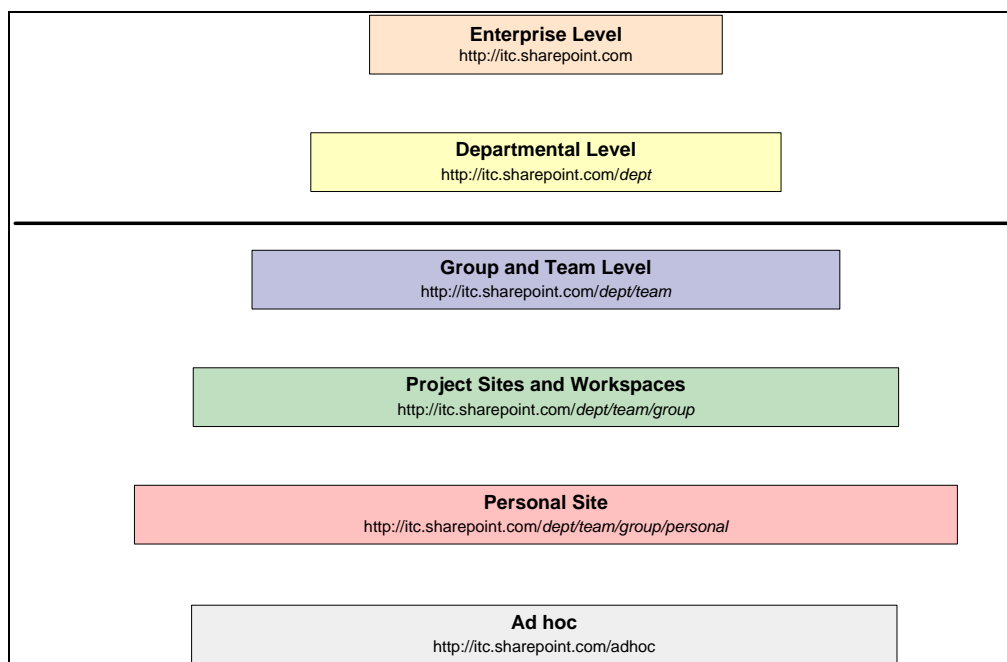
Site requests

Sites requests will list the following as required information.

Category	Description
Purpose	<ul style="list-style-type: none"> What is the intention of the site to be created? Will it be a Project, Departmental, or Community (external) site?
Value	<ul style="list-style-type: none"> How will this site benefit employees or the county?
Audience	<ul style="list-style-type: none"> Who will need access to the site and use the site?
Team Site Owner	<ul style="list-style-type: none"> Who is the person ultimately responsible for the site?
Site Administrator	<ul style="list-style-type: none"> Who will administer and maintain the site? Site Administrators will act as level 1 support for the sites they create.
Features	<ul style="list-style-type: none"> What are the features needed on the site (document storage, newsletter, calendar, team collaboration, etc.)?

URLs and security

Site URLs and security will be created according to the following standards:



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Site Provisioning Policies, Continued

**Site auto-
expiration**

To ensure data storage is reclaimed, sites untouched for 120 days will be slated for automatic deletion. Site Administrators will be notified when sites under their administrative control are slated for deletion and provided with a mechanism to remove it from the automatic deletion list.

Development Policies

Custom development

Any custom site development requires

- Scoping by an ITC business analyst,
- Review by ITC web developers, and
- Approval by ITC management.

This process includes any development under Windows Workflow Foundation (WinFX).

Tools

No web development tools (i.e. SharePoint Designer, Visual Studio, Cold Fusion, etc.) other than those provided by SharePoint 3.0 for development of the SharePoint user interface may be used. Any additional tools are permissible only for the development of external custom web applications.

Standards

Harris County SharePoint sites will be in compliance with applicable design standards and laws concerning copyrights, proprietary names and trademarks.

Web parts

Site Administrators wanting to add web parts to a site must request approval from the ITC. Upon approval, the web part would be made available as a shared service for all sites.

Storage Policies

Single document	By default, SharePoint imposes a 100 MB limit on the size of a single document that can be uploaded into a document library.
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Site Collections	A total of 10 GB will be allotted for department site collections.
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Overrides	The SharePoint Administrator can override storage quotas if necessary.
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Document Management Policies

Storage	<p>Documents used only by a team should be stored in document libraries on that team's SharePoint site (typically on that site's WSS server).</p> <p>Documents shared across multiple teams within a department should be stored in document libraries on the department's site (on the WSS server).</p>
File types	<p>Permitted file types include:</p> <ul style="list-style-type: none">• .doc• .xls• .ppt• .pdf <p>Prohibited file types include:</p> <ul style="list-style-type: none">• .mp3• .avi• .mdb• .mov
Software	<p>All software posted to the Harris County Intranet must comply with the laws of software distribution.</p>

Content Management Policies

Maintenance Content will be maintained by the appropriate business content owner, typically the author of the content.

Content categories The following are content categories and their corresponding policies.

Category	Policy
Internal	Internal content is not to be transmitted outside the group. Content that is not identified is considered to be Internal .
Confidential	Confidential content is not to be transmitted or shared with anyone who does not have authorization to see it.
Public Use	Public Use content has been deemed to not contain proprietary or confidential information and may be shared with anyone.
Privileged	Privileged content is regarded as attorney-client communication and shall be dated and not transmitted or shared with anyone who does not have authorization to see it.
Copyrighted	Copyrighted content shall be assumed to be protected by copyright and shall be dated and marked. It shall show the copyright owner's name and shall not be reproduced in electronic or hard-copy form without authorization.

Conduct Policy

Statement Harris County employees or agents using the Harris County SharePoint environments represent the county and are expected to conduct all business in a professional manner.

Procedures

Overview

The following are procedures for

- Requesting a new department site,
 - Requesting access to a site,
 - Obtaining SharePoint support, and
 - Becoming a SharePoint Site Administrator.
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**How to request
a new
department site**

New SharePoint sites can be requested by completing the following steps.

Step	Actor	Action
1	Approved Department Head representative	Fills out a site request form.
2	Approved Department Head representative	Submits form to SharePoint Administrator.
5	SharePoint Administrator	Creates the site per the request form.
6	SharePoint Administrator	Sends an e-mail informing the Site Administrator that the site is available.

**How to request
access to a site**

To request access to a SharePoint site, perform either of the following:

- Contact the site owner directly to request access.
 - If the site has the Access Requests option enabled, submit the access request when presented with that option.
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**How to obtain
support**

To obtain SharePoint support, perform any of the following:

- If support is needed on a team site, contact the team Site Owner.
 - If support is needed on a department site (or a team site, if the team Site Administrator cannot resolve the issue), contact the department Site Administrator.
 - If the issue cannot be resolved by the team Site Owner or department Site Administrator, contact the ITC Help Desk.
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Procedures, Continued

**How to become
a SharePoint
Site
Administrator**

All SharePoint Site Administrators must complete a Site Administrator training class and sign the SharePoint policy statement. All department sites and Site Administrators must be approved by the Department Head.

Complete the following steps to become a SharePoint Site Administrator.

Step	Action
1	Obtain approval from your Department Head.
2	Contact your ITC Business Analyst to request Site Administrator training.
3	Attend SharePoint Site Administrator training as scheduled.
4	Sign the SharePoint Application Usage Policy statement at the conclusion of the training class.
